

2021 ENVIRONMENTAL
SCAN

College Resources

College Resources

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1 HIGHLIGHTS

Revenues and expenses

- In 2019-20, college system revenues totaled \$5.5 billion. Grant revenue from all sources accounted for only 34 per cent of college system revenue.
- College system expenses amounted to \$5.2 billion in 2019-20. Like other organizations in both the public and private sectors, salaries and benefits together are by far the largest expense item for colleges.
- As of March 2020, the college system had an accumulated surplus of \$2.9 billion. Two-thirds of this surplus has been invested in capital assets.

Trends in college funding

- In 2019-20, real operating grants per full-time equivalent (FTE) student were about five per cent lower than in 2004-05 and 19 per cent lower than during the peak in 2007-08.
- Per student revenue from operating grants and tuition fees for Ontario colleges is the lowest among the provinces. Funding per student for Ontario colleges is significantly lower than for secondary schools and universities.
- Space per student is much lower for Ontario colleges (7.5 square metres per student in 2019) in comparison to universities and secondary schools and is in fact lower than it was in 2012.
- While the apprenticeship per diem in current dollars is higher than it was in 2004-05, it is seven per cent lower than it was 15 years ago, once inflation is taken into account. The in-school student fee has not increased since it was introduced in 2002-03.

Human resources

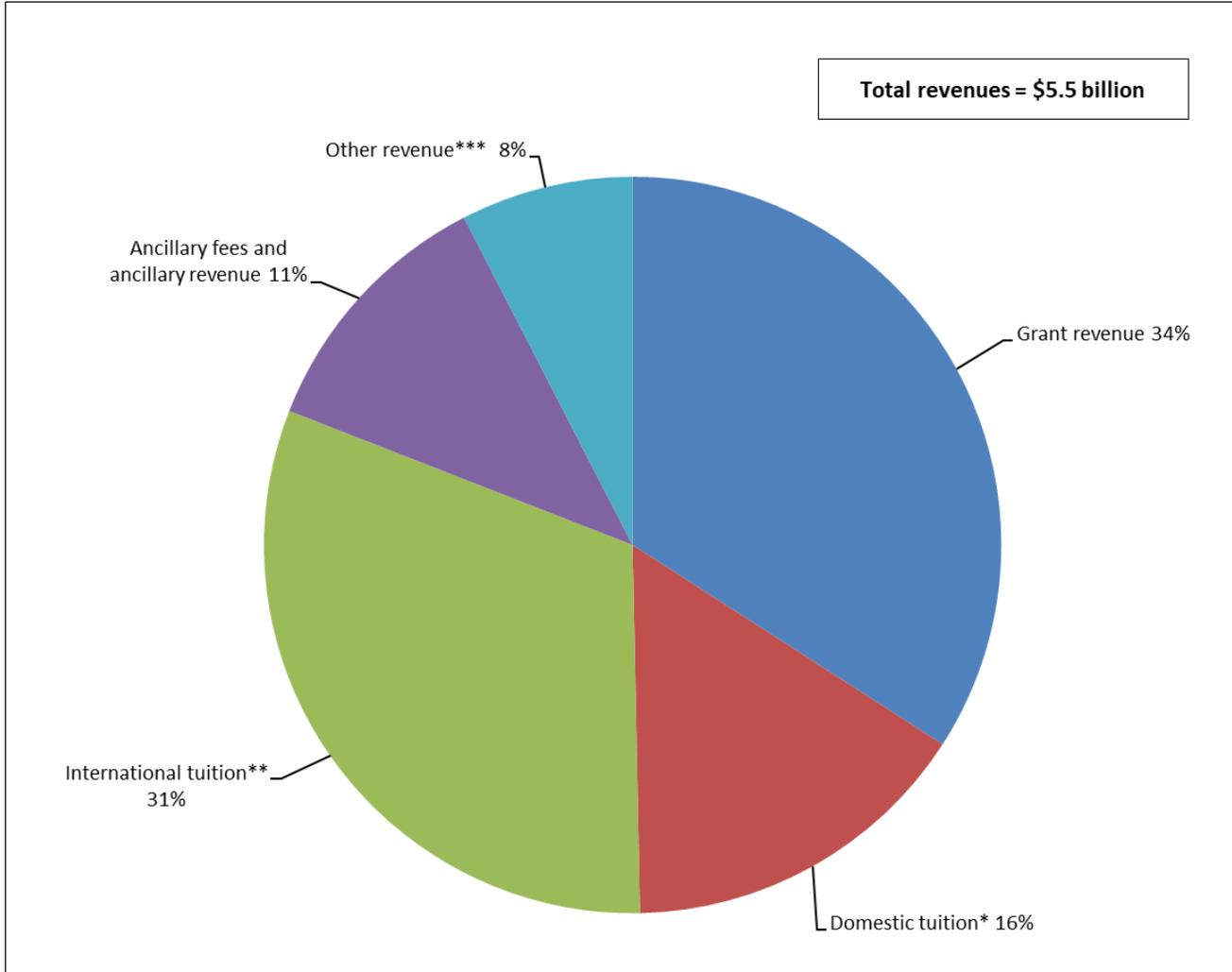
- Colleges employ almost 52,000 people. From 2004-05 to 2019-20, the number of full-time staff employed at colleges increased by 35 per cent.

Student financial aid

- In 2019-20, about 140,000 college students were OSAP recipients. This represents 74 per cent of the total full-time post-secondary enrolment.

2 COLLEGE SYSTEM REVENUES AND EXPENSES

2.1 College system revenues, 2019-20



*Includes apprenticeship classroom fee.

**Includes private partnership revenue.

***Includes contractual educational services, other fees for services and other revenues.

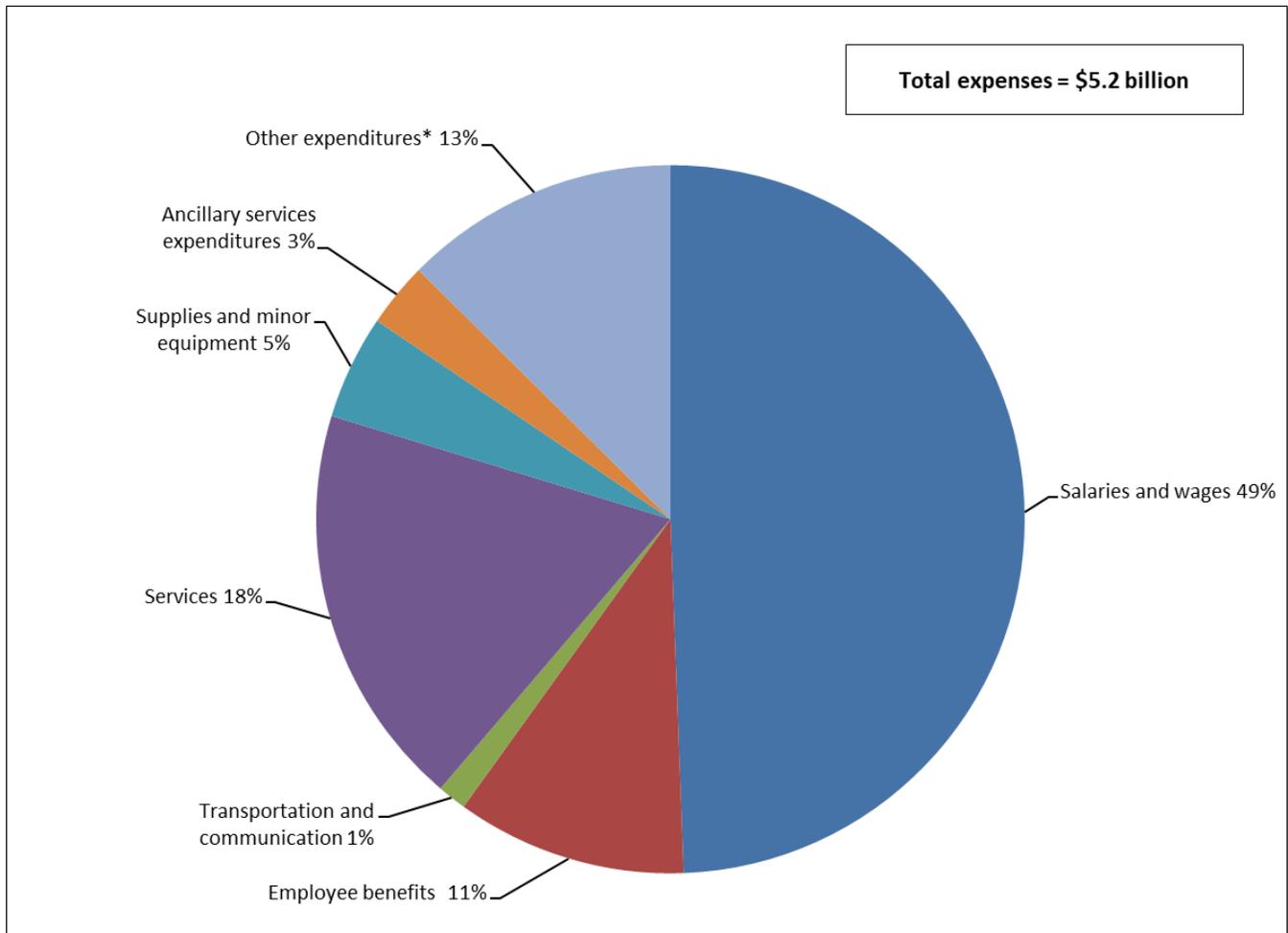
Source: Ontario Ministry of Colleges and Universities, CFIS.

Prepared by Colleges Ontario.



- In 2019-20, grant revenue from all sources accounted for only 34 per cent of college system revenues.
- Domestic and international tuition fees represent a significantly larger source of the total revenue than the revenue from grants.

2.2 College system expenses, 2019-20



*Includes amortization expense.

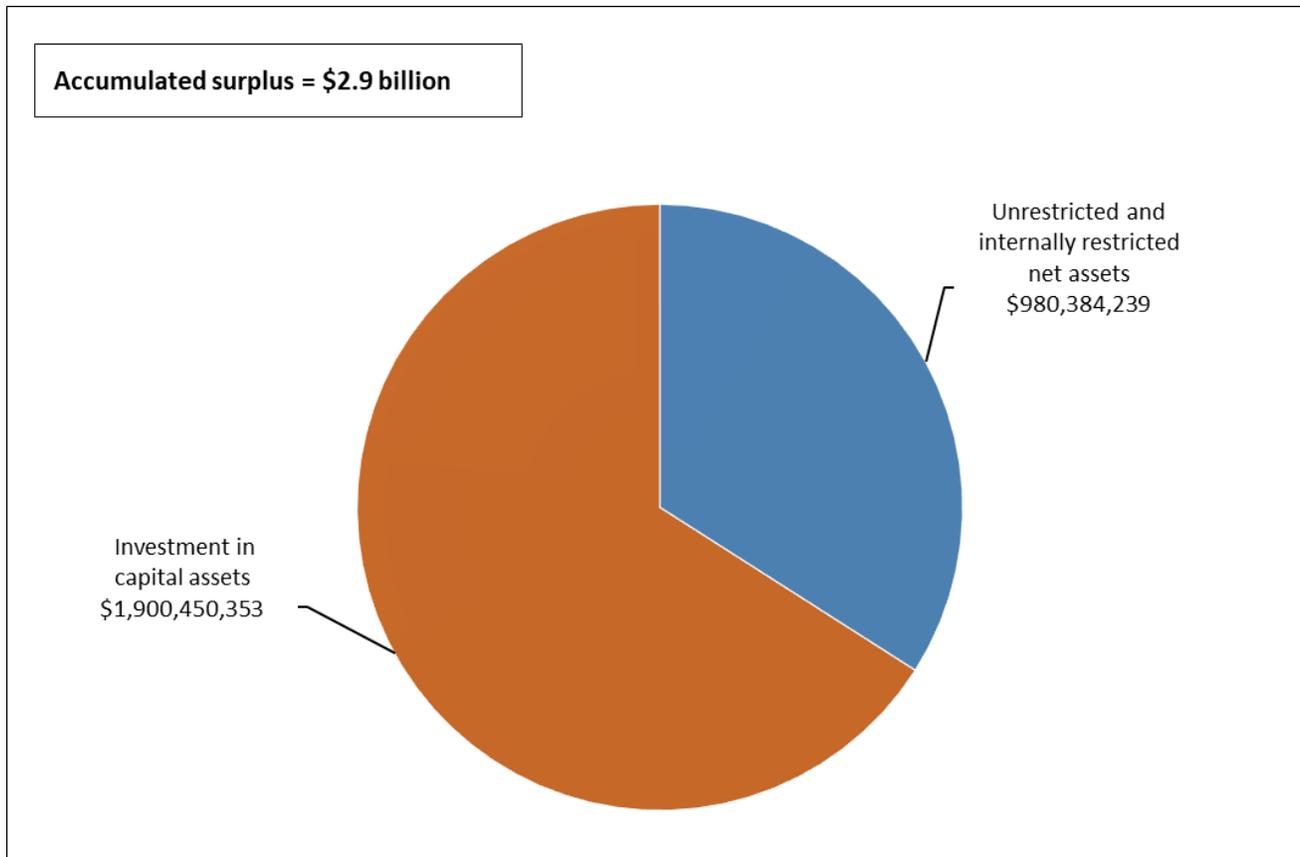
Source: Ontario Ministry of Colleges and Universities, CFIS.

Prepared by Colleges Ontario.



- College system expenses include items such as amortization expenses, contract services, scholarships and student assistance from the tuition set-aside.
- Like other organizations in both the public and private sectors, compensation costs – salaries and benefits together – are the largest expense item for colleges.

2.3 Accumulated surplus, Ontario colleges 2019-20



Note: As of March 2020.

Source: Ontario Ministry of Colleges and Universities, CFIS.

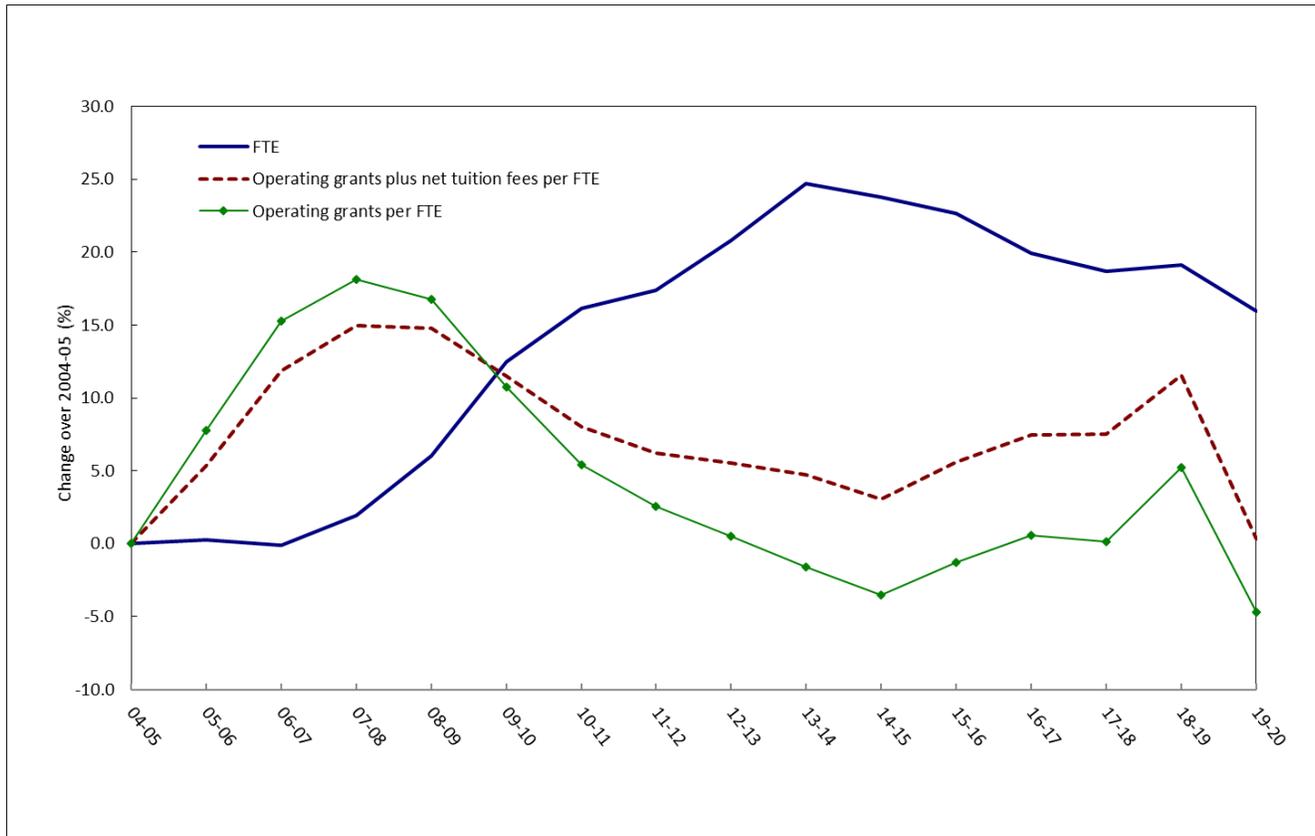
Prepared by Colleges Ontario.



- As of March 2020, the college system had an accumulated surplus of \$2.9 billion. Two-thirds of this surplus – \$1.9 billion – has been invested in capital assets. The funds have been used for major building projects and to purchase major assets such as lab equipment.
- One-third – \$980 million – falls into the unrestricted and internally restricted net assets category. Net assets in this category are used for a variety of purposes and future needs that include:
 - Providing stability to ongoing operations.
 - Responding to one-time evolving and emergent needs.
 - Funding long-term and ongoing capital commitments.
 - Strategic initiatives, including expansion and innovation.

3 TRENDS IN COLLEGE FUNDING

3.1 Enrolment and revenue changes, 2004-05 to 2019-20 (indexed to 2004-05)



Note: Revenue figures are in constant 2002 dollars. Figures exclude the tuition set-aside, collaborative and second-entry nursing, the nursing pilot, clinical education funding for collaborative nursing and funding for other organizations.

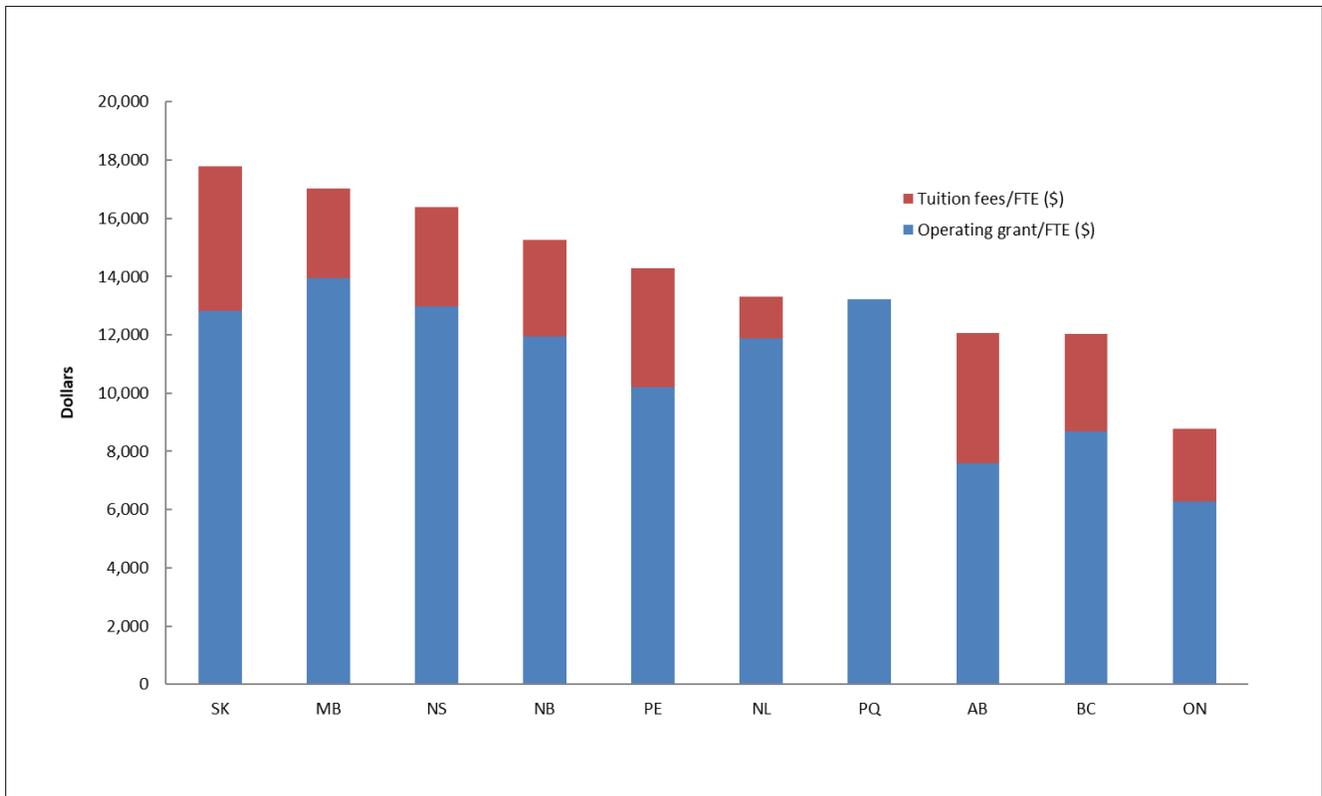
Sources: Ontario Ministry of Colleges and Universities, Ontario Ministry of Finance, Statistics Canada and Colleges Ontario.

Prepared by Colleges Ontario.



- In 2019-20, real operating grants per student are about five per cent lower than in 2004-05 and 19 per cent lower than they were at their peak in 2007-08.
- When tuition fees and operating grants are considered together, real per student revenue in 2019-20 was estimated to be 0.3 per cent higher than in 2004-05. When compared with the 2007-08 peak, it was almost 13 per cent lower.
- The funding decrease between 2018-19 and 2019-20 is partly attributable to the termination of the \$125 million in one-time funding provided to colleges in 2018-19 for supporting quality programs and student outcomes, along with a provincially mandated 10 per cent cut in tuition fees.

3.2 Estimated grant and tuition fee revenue per college student, by province, 2019-20



Note: Ontario figures exclude the tuition set-aside, collaborative and second-entry nursing, clinical education funding for collaborative nursing and funding for other organizations. Regulated tuition fees. Operating grants and enrolments are for provincially funded activity and exclude apprenticeship. Enrolment and funding data for Quebec are for full-time students.

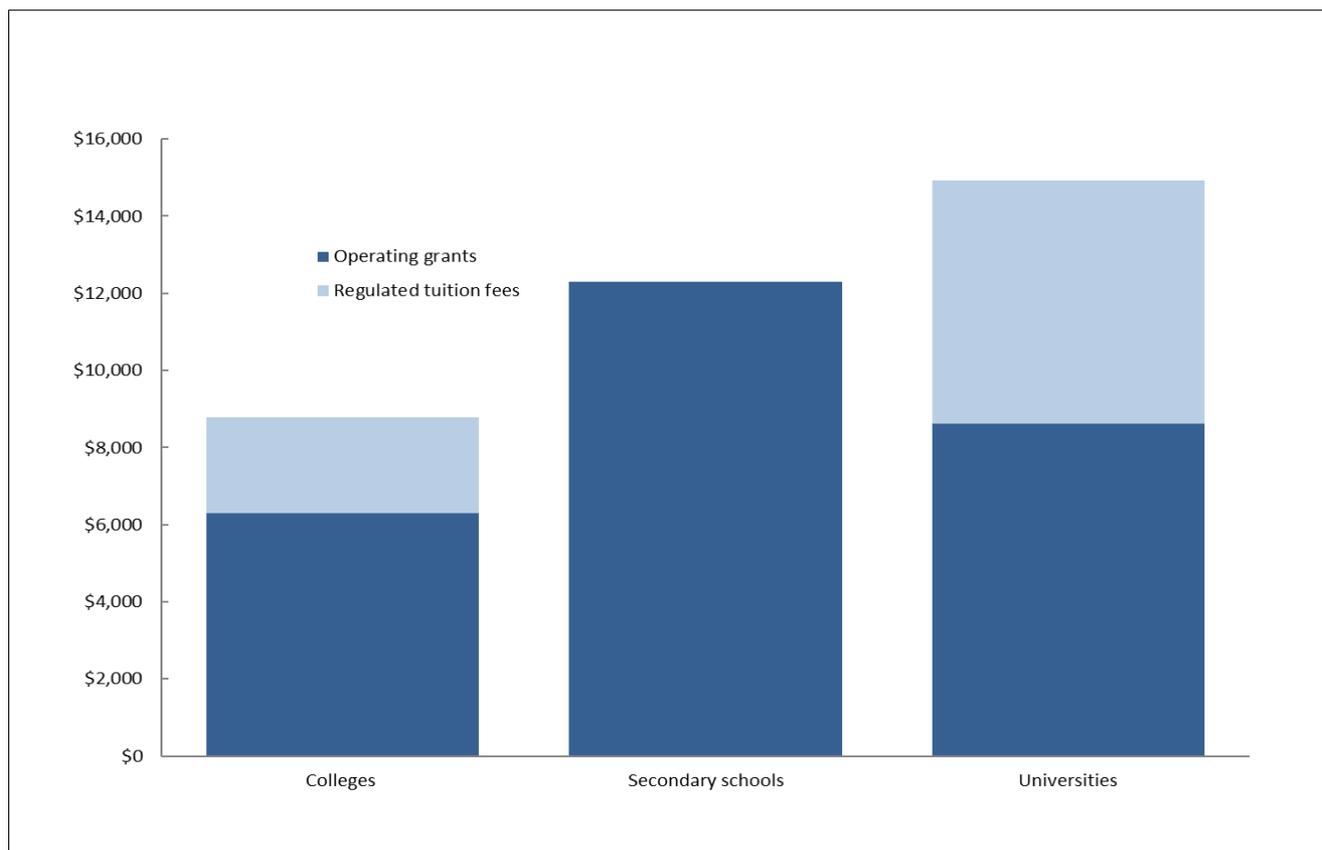
Sources: Ontario Ministry of Colleges and Universities, relevant provincial ministries and Colleges Ontario.

Prepared by Colleges Ontario.



- When college operating grants and tuition fees are considered together, per student revenue in Ontario in 2019-20 (about \$8,800) was significantly lower than in any other province.
- Per student revenue in Saskatchewan was the highest among the provinces and double that in Ontario.

3.3 Operating funding and regulated tuition fees per student, Ontario education sectors, 2019-2020



Note: Figures for colleges exclude the tuition set-aside, collaborative and second-entry nursing and clinical education funding for collaborative nursing. Figures for both colleges and universities exclude funding for other organizations.

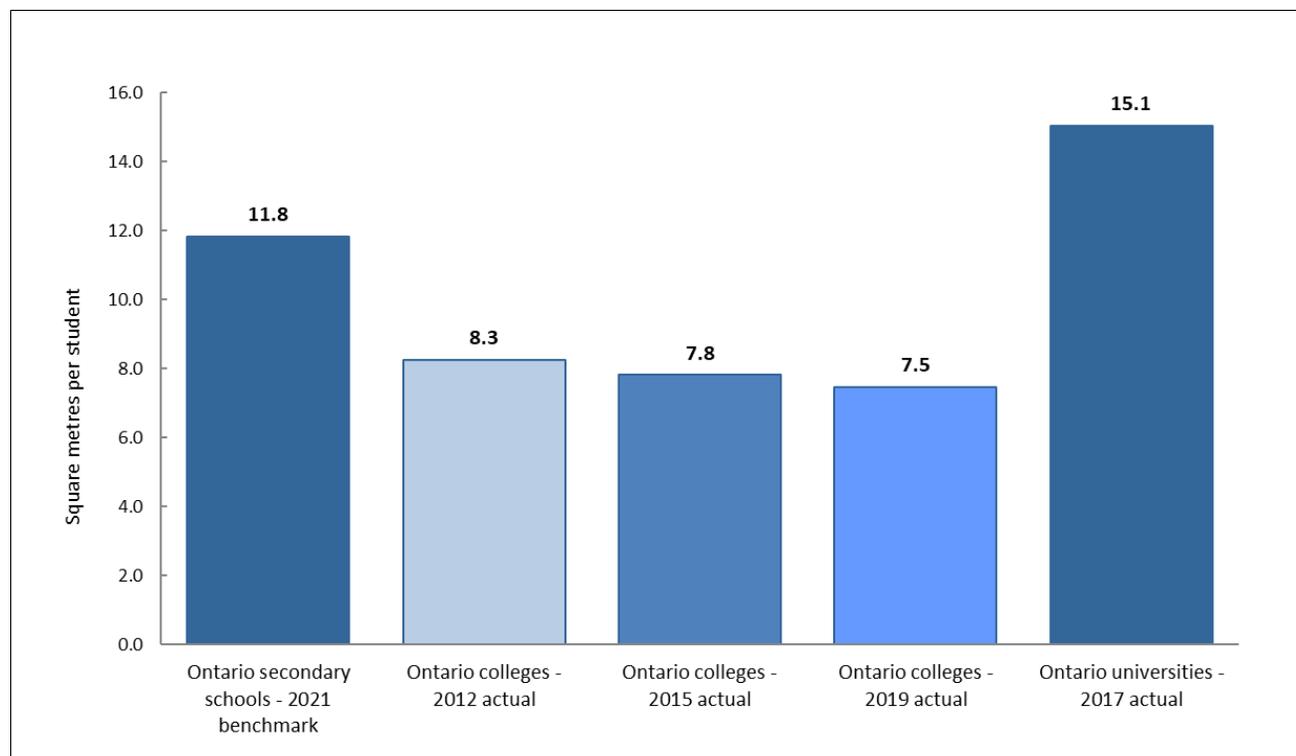
Sources: Ontario Ministry of Colleges and Universities, Ontario Public School Boards Association and Colleges Ontario.

Prepared by Colleges Ontario.



- On a per student basis, funding for Ontario colleges continues to lag behind publicly funded secondary schools and universities.

3.4 Square metres per student, Ontario education sectors



Sources: Ontario Ministry of Education, variable area per pupil benchmark table; Colleges Ontario’s facilities standards and inventory; and the Council of Ontario Universities 2016-17 inventory of physical facilities of Ontario universities.
Prepared by Colleges Ontario.



- Space per student in the college sector has declined since 2012, from 8.3 square metres per full-time equivalent student in 2012 to 7.5 square metres in 2019. The decline is attributable to a slower increase in space compared with enrolment growth.
- From 2012 to 2019, the total space inventory used by colleges increased by five per cent, while enrolment rose by 16 per cent.

3.5 Summary of apprenticeship per diem history, 2004-05 to 2019-20

	Per diem fee	Student fee	Total apprenticeship budget per student	Ontario CPI (constant 2002 dollars)	Per diem in constant 2002 dollars	Total per student apprenticeship budget in constant 2002 dollars
2004-05	\$53.47	\$10	\$63.47	104.6	\$51.12	\$60.68
2005-06	\$54.74	\$10	\$64.74	106.9	\$51.21	\$60.56
2006-07	\$56.03	\$10	\$66.03	108.8	\$51.50	\$60.69
2007-08	\$56.03	\$10	\$66.03	110.8	\$50.57	\$59.59
2008-09	\$57.35	\$10	\$67.35	113.3	\$50.62	\$59.44
2009-10	\$57.35	\$10	\$67.35	113.7	\$50.44	\$59.23
2010-11	\$57.35	\$10	\$67.35	116.5	\$49.23	\$57.81
2011-12	\$57.35	\$10	\$67.35	120.1	\$47.75	\$56.08
2012-13	\$57.35	\$10	\$67.35	121.8	\$47.09	\$55.30
2013-14	\$57.35	\$10	\$67.35	123.0	\$46.63	\$54.76
2014-15	\$57.35	\$10	\$67.35	125.9	\$45.55	\$53.49
2015-16	\$61.36	\$10	\$71.36	127.4	\$48.16	\$56.01
2016-17	\$63.09	\$10	\$73.09	129.7	\$48.64	\$56.35
2017-18	\$63.09	\$10	\$73.09	131.9	\$47.83	\$55.41
2018-19	\$63.09	\$10	\$73.09	135.0	\$46.73	\$54.14
2019-20	\$65.51	\$10	\$75.51	137.5	\$47.64	\$54.92
Per cent change 2004-05 to 2019-20	23%		19%	31%	-7%	-9%

Note: Per diem and classroom fees are based on the standard six-hour training day.
 Sources: Ontario Ministry of Colleges and Universities, Ontario Ministry of Finance and Statistics Canada.
 Prepared by Colleges Ontario.



- In current dollars, the apprenticeship per diem is 23 per cent higher than it was in 2004-05. However, the per diem is seven per cent lower than it was 15 years ago, once inflation is taken into account. The in-school student fee has not increased since its introduction in 2002-03.

4 HUMAN RESOURCES TRENDS

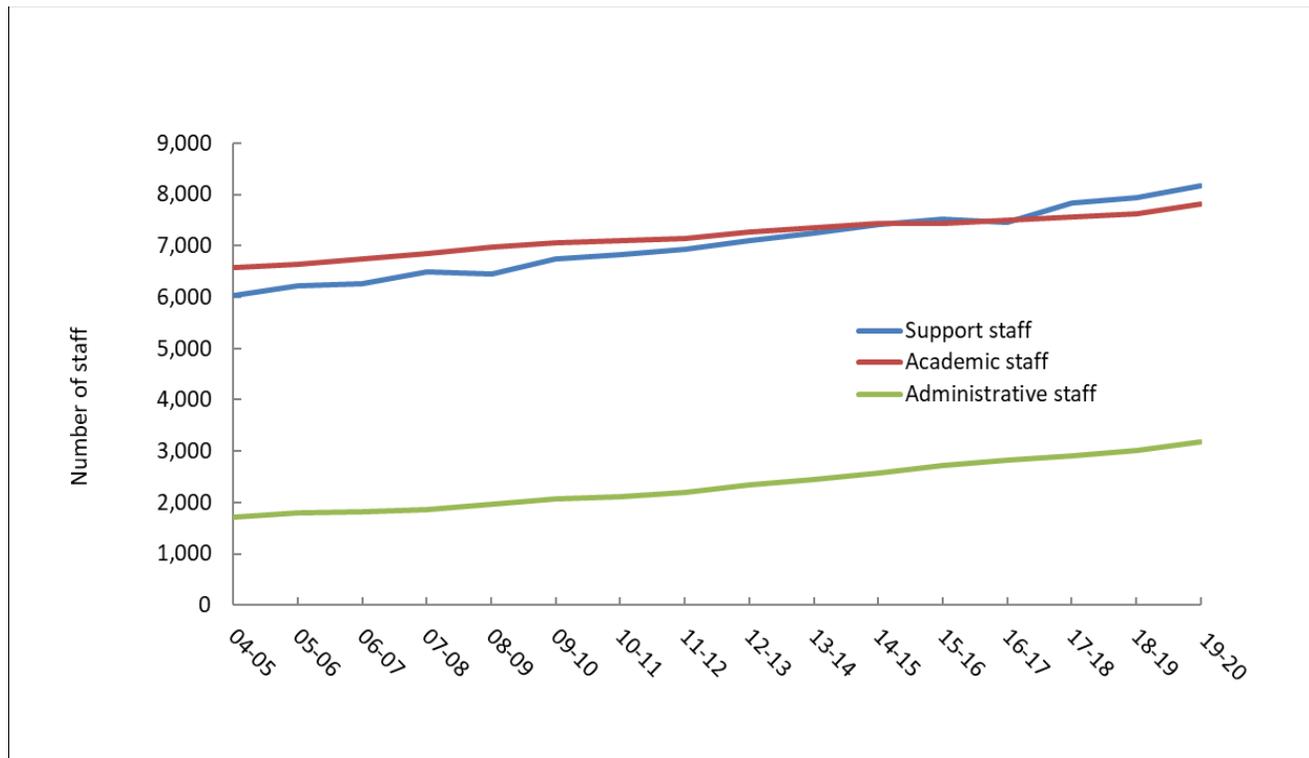
4.1 College staffing levels (head count), 2019-20

	Full time	Part time	Total
Academic staff	8,066	16,341	24,407
Support staff	8,276	15,578	23,854
Administrative staff	3,388	N/A	3,388
Total	19,730	31,919	51,649

Source: College Employer Council.
Prepared by Colleges Ontario.



4.2 Number of full-time college staff by category, 2004-05 to 2019-20



Source: College Employer Council.
Prepared by Colleges Ontario.



- Colleges employ close to 52,000 people. The total number of full-time staff at colleges increased by 35 per cent between 2004-05 and 2019-2020.

5 STUDENT FINANCIAL AID

5.1 Levels of student assistance and number of recipients, college sector

	Canada-Ontario Integrated Student Loans (\$)	Total Canada and Ontario grants excluding OSOG ^{1,2} (\$)	College OSAP recipients ³ (#)	Total full-time post-secondary enrolment ^{**} (#)	% of Total ⁴
2009-10	545,333,004	152,203,148	81,328	172,070	47%
2010-11	623,246,349	164,232,978	88,712	178,139	50%
2011-12*	689,338,751	195,598,764	111,529	179,740	62%
2012-13	782,584,506	224,477,517	124,551	185,445	67%
2013-14	857,042,853	240,984,355	130,962	192,466	68%
2014-15	832,532,779	243,396,255	128,991	190,758	68%
2015-16	860,539,492	243,991,816	131,304	190,945	69%
2016-17	834,681,397	307,159,230	132,622	186,804	71%
2017-18	625,487,601	873,237,103	149,153	189,659	79%
2018-19	675,510,633	1,026,787,591	159,593	186,119	86%
2019-20	619,813,263	734,466,789	140,335	189,845	74%

Notes:

*From 2011-12 to 2016-17, the number of OSAP recipients included students who received the 30% Off Ontario Tuition grant.

**Full-time post-secondary head count (excludes other, sponsored and international students).

¹The Ontario Student Opportunity Grant (OSOG) reduces repayable debt on Canada-Ontario Integrated Student Loans. OSOG was discontinued in 2017-18 with the introduction of the Ontario Student Grant.

²The composition of Canada and Ontario grants has evolved over time.

³Starting in 2017-18, the Ministry of Colleges and Universities changed its reporting methodology. The methodology changed to the number of students issued full-time OSAP awards from the previously used number of full-time OSAP award entitlements.

⁴The rate shown reflects the number of students issued OSAP awards at the academic year end. This rate does not correspond to OSAP's calculated participation rate, which aligns methodologies for OSAP counts and enrolment counts using a common date of Nov. 1.

Source: Ontario Ministry of Colleges and Universities.



5.2 Canada-Ontario Integrated Student Loan default rates

Type of institution	Default rate for 2019 (%)
Public colleges	8.9
Universities	3.0
Private career colleges	11.7
Other institutions	3.1
Ontario total	6.5

Source: Ontario Ministry of Colleges and Universities.
Prepared by Colleges Ontario.



- The default rate reflects the percentage of borrowers who have defaulted on their loans. The rates are calculated at a given point in time, approximately two years after the loans have entered repayment status. Thus, the 2019 default rates represent the loan defaults of 2016-17 borrowers at two years into repayment.

6 APPENDICES

6.1 Appendix 1. Operating grants and regulated tuition fee revenue per FTE, 2004-05 to 2019-20

Academic year	Total operating grants ¹ (\$millions)	FTE	Total operating grants per FTE	Ontario CPI (constant 2002 dollars) ²	Total operating grants per FTE - constant dollars	Regulated tuition fee revenue per FTE	Tuition fee revenue per FTE - constant dollars	Tuition set-aside per FTE ³	Net tuition fee revenue per FTE	Net tuition fee revenue per FTE - constant dollars	Total operating grants plus net tuition fees per FTE	Total operating grants plus net tuition fees per FTE - constant dollars
2004-05	\$916	182,413	\$5,022	104.6	\$4,801	\$1,820	\$1,740	\$180	\$1,640	\$1,568	\$6,662	\$6,369
2005-06	\$1,012	182,873	\$5,531	106.9	\$5,174	\$1,820	\$1,703	\$180	\$1,640	\$1,534	\$7,171	\$6,708
2006-07	\$1,097	182,255	\$6,022	108.8	\$5,535	\$1,911	\$1,756	\$180	\$1,731	\$1,591	\$7,753	\$7,126
2007-08	\$1,169	185,939	\$6,285	110.8	\$5,673	\$2,008	\$1,812	\$180	\$1,828	\$1,650	\$8,113	\$7,323
2008-09	\$1,228	193,420	\$6,351	113.3	\$5,606	\$2,110	\$1,862	\$180	\$1,930	\$1,703	\$8,281	\$7,309
2009-10	\$1,241	205,203	\$6,046	113.7	\$5,318	\$2,208	\$1,942	\$180	\$2,028	\$1,784	\$8,074	\$7,101
2010-11	\$1,249	211,817	\$5,896	116.5	\$5,061	\$2,311	\$1,984	\$190	\$2,121	\$1,820	\$8,017	\$6,882
2011-12	\$1,266	214,135	\$5,913	120.1	\$4,923	\$2,414	\$2,010	\$201	\$2,213	\$1,843	\$8,126	\$6,766
2012-13	\$1,295	220,369	\$5,877	121.8	\$4,825	\$2,524	\$2,072	\$212	\$2,312	\$1,899	\$8,189	\$6,724
2013-14	\$1,321	227,416	\$5,810	123.0	\$4,723	\$2,618	\$2,128	\$221	\$2,397	\$1,949	\$8,207	\$6,672
2014-15	\$1,316	225,731	\$5,831	125.9	\$4,632	\$2,658	\$2,111	\$225	\$2,433	\$1,932	\$8,264	\$6,564
2015-16	\$1,351	223,782	\$6,037	127.4	\$4,739	\$2,770	\$2,174	\$236	\$2,534	\$1,989	\$8,571	\$6,727
2016-17	\$1,370	218,721	\$6,264	129.7	\$4,830	\$2,859	\$2,204	\$245	\$2,614	\$2,015	\$8,878	\$6,845
2017-18	\$1,373	216,488	\$6,343	131.9	\$4,809	\$2,946	\$2,234	\$254	\$2,692	\$2,041	\$9,035	\$6,850
2018-19	\$1,482	217,242	\$6,823	135.0	\$5,054	\$3,033	\$2,247	\$263	\$2,771	\$2,052	\$9,593	\$7,106
2019-20	\$1,331	\$211,504	\$6,292	137.5	\$4,576	\$2,726	\$1,983	\$232	\$2,494	\$1,814	\$8,786	\$6,390
Per cent change 2004-05 to 2019-20	45.3	15.9	25.3	31.5	-4.7	49.8	13.9	28.7	52.1	15.7	31.9	0.3

Notes:

¹Figures exclude collaborative and second-entry nursing, nursing pilot programs, clinical education funding for collaborative nursing and funding for other organizations.

²Sources for the consumer price index include Statistics Canada and the Ontario Ministry of Finance. Other sources include the Ontario Ministry of Colleges and Universities and Colleges Ontario.

³Tuition set-aside figures are estimates.



6.2 Appendix 2. Number of college student assistance recipients, by student type

Student group	2014-15*	2015-16*	2016-17*	2017-18**	2018-19**	2019-20**
Dependant at home	41,587	41,511	41,164	43,739	45,430	38,140
Dependant away	31,378	30,683	28,508	27,098	28,580	23,577
Dependant/independent (home)***	n/a	n/a	n/a	n/a	n/a	5,669
Dependant/independent (away)***	n/a	n/a	n/a	n/a	n/a	3,654
Independent home	12,934	15,175	17,262	23,350	23,499	15,440
Independent away	25,387	26,074	26,938	31,975	34,080	26,586
Married	9,000	9,403	10,289	14,049	18,158	18,230
Sole support	8,705	8,458	8,461	8,942	9,846	9,039
Total	128,991	131,304	132,622	149,153	159,593	140,335

Notes:

*Up to 2016-17, the numbers included students who received the 30% Off Ontario Tuition grant.

**Starting in 2017-18, the Ministry of Colleges and Universities changed its reporting methodology, going to the number of students issued full-time OSAP awards from the previously used number of full-time OSAP award entitlements.

***These students are assessed as independent students in the Canada assessment and as dependants in the Ontario assessment.

Source: Ontario Ministry of Colleges and Universities.



6.3 Appendix 3. Average student assistance issued to college students, by student type

Student group	2014-15*	2015-16*	2016-17*	2017-18**	2018-19**	2019-20**
Dependant at home	4,522	4,684	4,828	5,771	6,033	4,924
Dependant away	7,328	7,465	7,790	9,351	9,748	8,457
Dependant/independent (home)***	n/a	n/a	n/a	n/a	n/a	5,380
Dependant/independent (away)***	n/a	n/a	n/a	n/a	n/a	9,221
Independent home	6,096	6,295	6,253	7,117	7,188	5,612
Independent away	10,899	10,465	10,568	11,604	11,719	10,344
Married	14,363	15,569	15,501	17,252	18,969	18,037
Sole support	19,890	19,691	19,963	23,855	24,061	23,501
Total	8,341	8,414	8,610	10,048	10,666	9,650

Notes:

*Up to 2016-17, the numbers included students who received the 30% Off Ontario Tuition grant.

**Starting in 2017-18, the Ministry of Colleges and Universities changed its reporting methodology, going to the number of students issued full-time OSAP awards from the previously used number of full-time OSAP award entitlements.

***These students are assessed as independent students in the Canada assessment and as dependants in the Ontario assessment.

Source: Ontario Ministry of Colleges and Universities.



6.4 Appendix 4. Distribution of student assistance recipients by post-secondary sector* and student group, 2019-20

	Married/sole support		Independent		Dependant		Dependant/independent**	
	#	% of student group	#	% of student group	#	% of student group	#	% of student group
Public colleges	27,269	49.9%	42,026	41.6%	61,717	30.0%	9,323	26.5%
Universities	13,072	23.9%	52,490	51.9%	141,435	68.8%	25,061	71.3%
Private career colleges	13,603	24.9%	5,072	5.0%	1,781	0.9%	489	1.4%
Other Ontario post-secondary institutions	731	1.3%	1,546	1.5%	682	0.3%	277	0.8%

Notes:

*Distribution of recipients attending Ontario institutions.

**These students are assessed as independent students in the Canada assessment and as dependants in the Ontario assessment.

Source: Ontario Ministry of Colleges and Universities.

